

MEMORANDUM

To: Board of Visitors
Executive Committee
Center Advisory Boards

From: Patrick M. Rooney, Executive Director

Date: February 22, 2012

Subject: Center on Philanthropy Activities

We have progress to share on the proposed new school. The task force submitted their report last month and we have updated the working paper (attached). We hosted a Town Hall meeting on February 16th with Chancellor Bantz, Executive Associate Dean Baumer, and me presiding to a full room of faculty, staff, students, alumni, and university and community leaders. Chancellor Bantz reported that we have a window of opportunity to create the new school as this issue has the attention of the university leadership, the Center's Board of Visitors, and the IU Trustees. He has asked for a report on the proposed school that can be shared with the trustees. He said the new school could very well be put on the fast track. Our next steps will be to have a discussion and votes with the Philanthropic Studies and School of Public and Environmental Affairs (SPEA) faculties as early as March 3.

In addition to the discussion about a proposed new school, the Center has been involved in the following recent activities.

Board of Visitors

- Board member Don Buttrey and the late Karen Lake Buttrey, former Board member, will receive honorary doctorates awarded from Indiana State University (ISU). In addition, Don received the John P. Newton Spirit of ISU Award in 2011.

Development-Communications

- The Center earned outstanding success in top national media outlets in the last quarter of 2011. We appeared in 89 top-level media outlets, an average of nearly 30 per month! That more than doubles our goal of at least 12 top-level media clips per month. From October through December, the Center was quoted or cited:
 - eight times in *The Chronicle of Philanthropy*,
 - four times by *The New York Times* and *MarketWatch*,
 - three times each by *Associated Press*, *Reuters*, *The Wall Street Journal*, *Forbes*, *USA Today*, *Indianapolis Business Journal* and *The Nonprofit Quarterly*,
 - twice each in *The Washington Post*, *Bloomberg News* and *The Indianapolis Star*, and
 - by *National Public Radio*, *Barron's*, *The International Herald Tribune*, *Los Angeles Times*, *Financial Times*, *CNBC* and *HuffingtonPost.com*.
- Media outlets continue to rely on our insights as they report breaking news stories:
 - Data from the *Bank of America Merrill Lynch Study of High Net Worth Philanthropy* was cited in *Associated Press* [stories](#) about the presidential candidates' tax returns and their charitable giving.
 - A *New York Times* [infographic](#) on the candidates drew on data from *Giving USA* and from our *COPPS* research on giving by people of various faith affiliations.

- Leslie Lenkowsky, Clinical Professor of Public Affairs and Philanthropic Studies Bloomington Liaison for the Center on Philanthropy Faculty, was quoted in an *Indianapolis Business Journal* [article](#) on volunteering for the Super Bowl.
- I was quoted in an *MSNBC* [story](#) on how an IPO of Facebook might affect charitable giving. The story was also picked up by *The Nonprofit Quarterly*.
- Board member Gene Tempel was quoted in a *Chronicle of Higher Education* article about the increase in giving to colleges and universities.

Research

- A paper written by Melanie McKittrick and Deb Hirt, both working at the Center's Research Department, was published in the special edition of *Foundation Review* entitled "Family Foundations and Philanthropy," Volume 3, Issue 4. The paper entitled *Family Foundation Board Dispersion: An examination of challenges and strategies for family foundations with geographically dispersed board members* examines how family foundations of different sizes and types address the challenges that come when family foundation board members are dispersed geographically, nationally, or internationally.
- The first issue of *Giving USA Spotlight in 2012* was released this month. It includes the Annual Survey of State Laws Regulating Charitable Solicitations as of January 1, 2012. It is available for free on the Giving USA [website](#).
- This month, the Center teamed up with the Salvation Army to create a *Human Needs Index* to gauge poverty-related need, and changes in need, across the country. The Center's research staff will use data from the Army as well as other data sources to develop a dynamic index to track poverty-related needs and the adequacy of efforts to address those needs. The first phase will result in the creation of a pilot version of the Human Needs Index.

Academic Programs

- On January 24, Takayuki Yoshioka, a PhD candidate in Philanthropic Studies, gave a presentation at the Workshop in Multidisciplinary Philanthropic Studies entitled *Representational Roles of Nonprofit Organizations in the Public Policy Process*.
- Beth Gazley, Associate Professor of Public Affairs and Philanthropic Studies at SPEA Bloomington, received *Indiana University's Thomas Ehrlich Award for Service Learning* for research on community agencies' capacity to work with student service-learners and interns. The research was conducted in collaboration with Laura Littlepage, Clinical Lecturer at Public Affairs and Philanthropic Studies as well as Senior Policy Analyst at Public Policy Institute, and Teresa Bennett, a PhD candidate in Philanthropic Studies.
- Jennifer Brass, Assistant Professor of Public Affairs and Philanthropic Studies at SPEA Bloomington, published an article entitled *Why Do NGOs Go Where They Go? Evidence from Kenya*. The article is available [here](#).
- On February 24-25, Van Evans, a PhD student in Philanthropic Studies, presented a paper entitled *Did Sixteenth Century Spanish Conquests Influence Voluntarism and Donating in Latin America Today?* at the University of Pittsburgh's Latin American Social and Public Policy Conference.
- Christiana Atibil, a PhD candidate in Philanthropic Studies, published a paper entitled *Democratic Governance and Actors' Conceptualization of "Civil Society" in Africa: State-Civil Society Relations in Ghana from 1982-2000*. The reference information and the paper are available [here](#).

International Programs:

- Ms. Ping Lu, Professor of Education at Zhejiang Normal University in Jinhua, China, arrived this month to spend the spring semester at IUPUI. Ms. Lu is interested in early

childhood education and philanthropy and will be meeting with faculty and students, and conducting research during her visit.

- From February 16 - 25, four faculty members from the Center, Dwight Burlingame, Una Osili, Deb Mesch, and Wolfgang Bielefeld, traveled to China to visit with colleagues from the University of Hong Kong (HKU) and Sun Yat-sen University (SYSU). This trip, sponsored with generous support by the Rockefeller Brothers Fund, facilitated talks regarding potential collaboration between the Center and HKU for their research project on giving and volunteering in Hong Kong, and constituted the second of several faculty exchanges with SYSU designed to strengthen the partnership between both centers as well as contribute to the development of the nonprofit sector in Southern China.
- Following our request to establish a formal partnership with the Asian Centre for Social Entrepreneurship and Philanthropy (ACSEP) at the National University of Singapore (NUS), the Office of the Vice Provost of International Affairs for Indiana University asked us to help them establish a university-to-university agreement between IU and NUS, in advance of Shawn Reynolds' (University Director International Partnerships and Strategic Initiatives) trip to Singapore in March, and IU President McRobbie's trip to Southeast Asia this coming May.
- Mr. Li Li, Vice Secretary-General of the China Foundation for Poverty Alleviation returned to China this month following six months as a visiting scholar at the Center. He received the Certificate in Fundraising at The Fund Raising School, acted as advisor to the Chinese Philanthropy Leadership Initiative, a student group founded by Chinese graduate students at the Center on Philanthropy, met with several faculty members in Indianapolis and Bloomington, and discussed opportunities for future collaboration between the Center, his foundation, and other NGOs in China.

The Fund Raising School (TFRS)

- TFRS conducted contract programs for Grand Valley State University, the Oklahoma Museum Network, and the United Way of Murray-Calloway County (Kentucky).
- Additionally, the first two public course offerings of the year, *Principles & Techniques of Fundraising* and *Managing the Capital Campaign*, both had very strong enrollments with one selling out and the other coming very close to selling out.

Lake Institute

- On February 23-24, the Lake Institute began a series of national CCCG (Creating Congregational Cultures of Generosity) seminars with the Presbyterian Church USA by conducting two one-day seminars in Dallas and Fort Worth. More seminars will follow in each city during May and September of this year.

As always, please let me know if you have any comments or questions. I look forward to seeing you at our Board meeting next month in Indianapolis. A copy of the agenda for the March board meeting is attached.